



NIQ Design Impact Awards

Driving ROI through Packaging Design

NIQ Speakers



Ting Szu Tan

Based in Singapore

**Director, APAC Above Market
Consulting & Insights**

- Ting Szu brings over 20 years of experience in FMCG market research, combining measurement, quantitative, and qualitative insights to support both manufacturers & retailers.
- She partners with clients on strategic decision-making, delivering actionable trends and insights that drive brand growth, and is a regular speaker at industry events and seminars.



Jayati Basu

Based in Singapore

**APAC
Practice Lead Ad & Design**

- Jayati has spent over 5 years supporting marketers with neuroscience backed insights to support their business decision making.
- Her career spans over 20 years with deep expertise in neuromarketing & quantitative research techniques, as well as analytics across Asia Pacific, the Middle East & Africa.



Dr. Parul Savale PhD

Based in India

**APAC & EEMEA
Neuroscientist**

- Dr. Parul is an Ex-EdTech Startup founder with over 5 years of experience with product building using cognitive neuroscience principles.
- In her current role at NIQ, she designs, researches and consults with marketers on leveraging neuroscience insights to drive real world impact



AGENDA

NIQ Design Impact Awards 2026

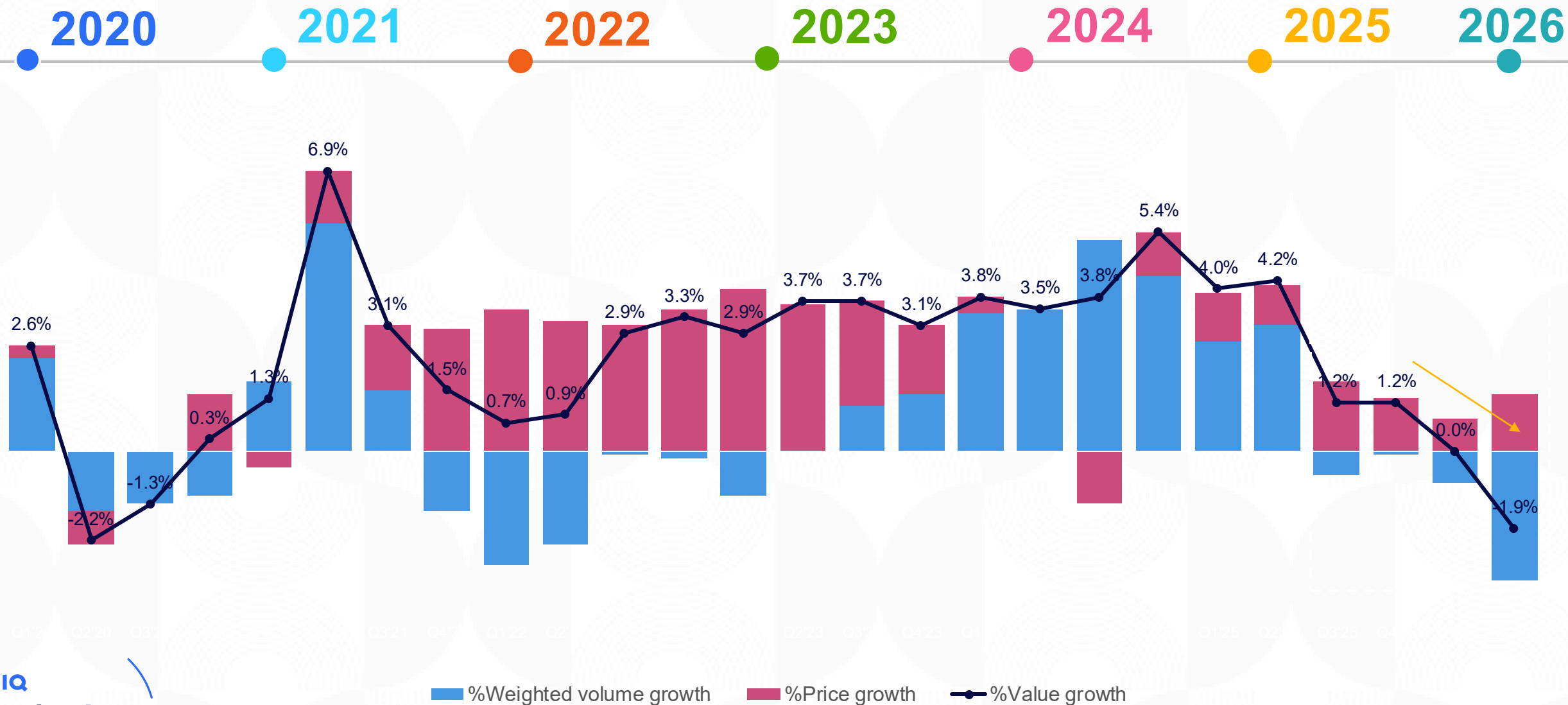
NIQ

DURATION	TOPIC	SPEAKER
12 mins	Challenges brands face in APAC today	Ting Szu Tan
15 mins	Driving ROI through Pack Design – learn from winning packs	Jayati Basu
15 mins	The Neuroscience of Pack Design	Dr. Parul Savale PhD
	Q&A	

Challenges brands face in APAC today

Ting Szu Tan

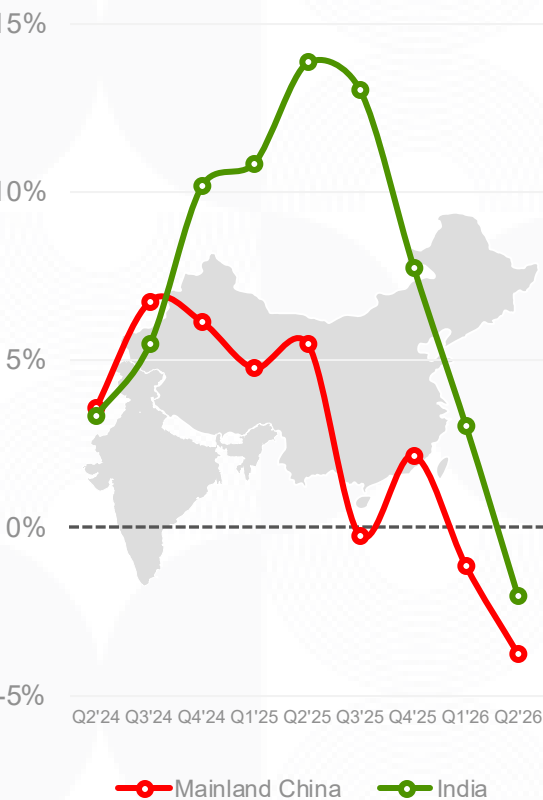
Priority will be to address the volume decline for APAC to bounce back in H2



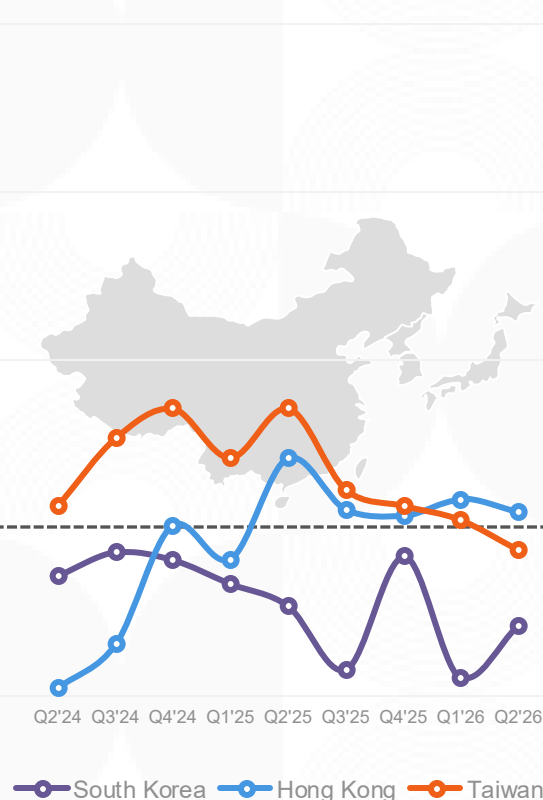
Strategize to leverage the tailwinds and circumvent the headwinds across the region

Quarterly FMCG Value growth vs. same period last year

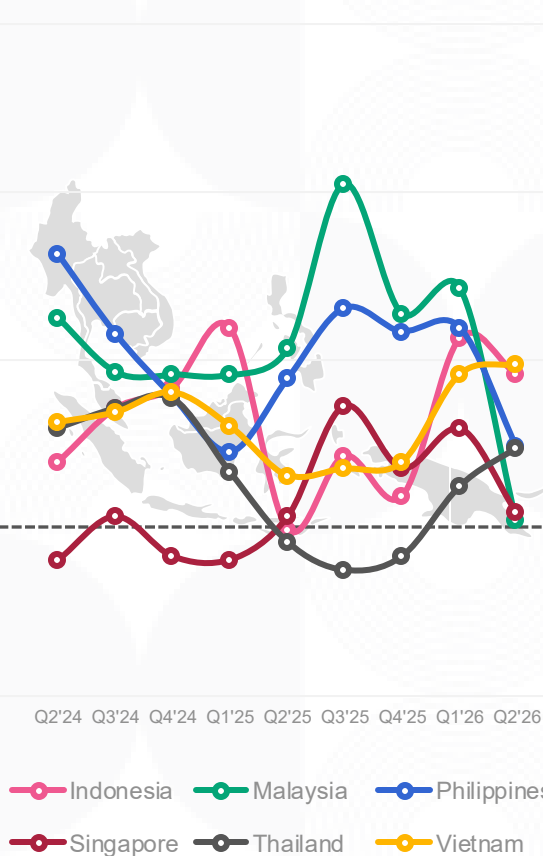
The Superpowers



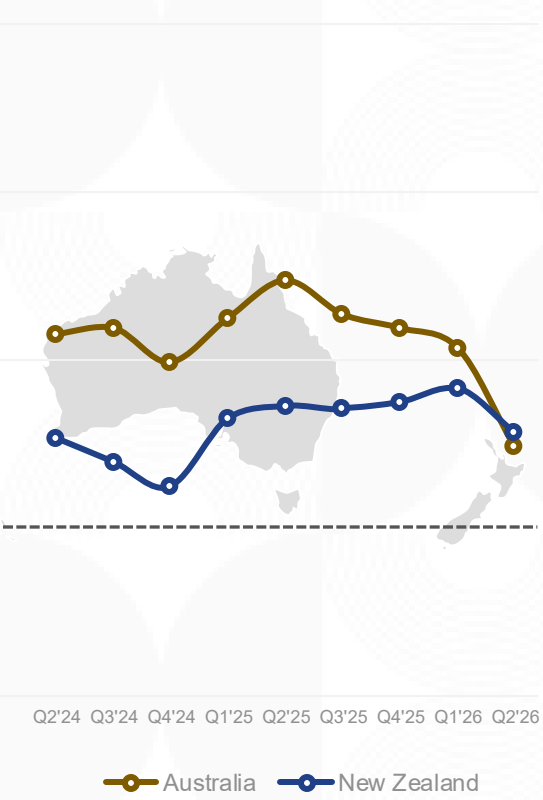
Northeast Asia



Southeast Asia

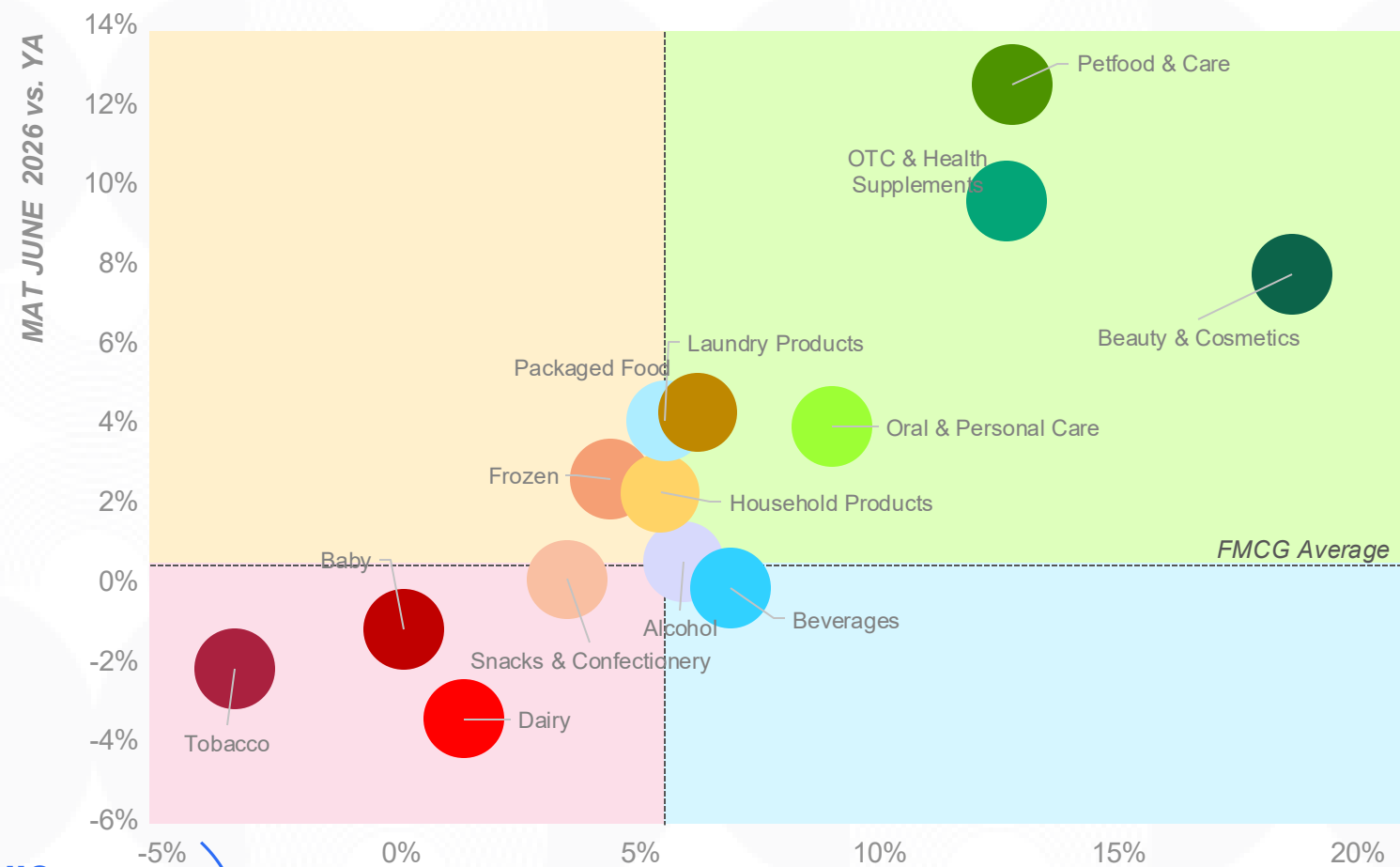


Pacific

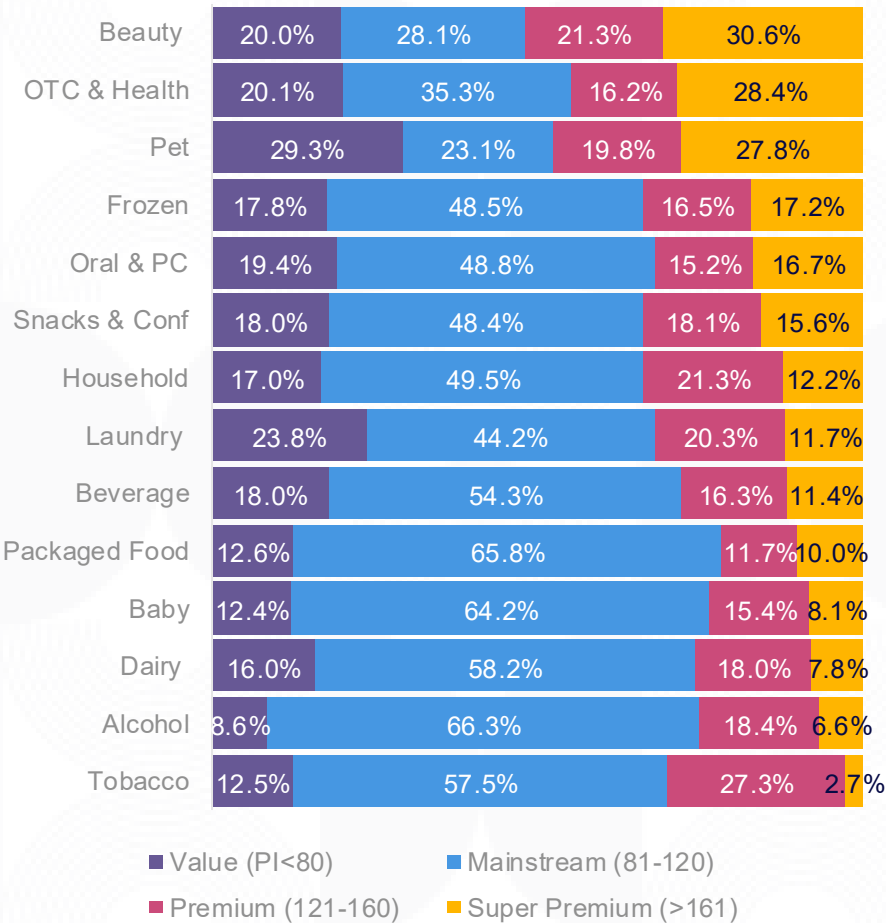


Premiumize to help accelerate value growth as consumers shift to health and wellbeing

Asia Pacific FMCG Industries' Value Growth % vs. YA



Price Tier Importance

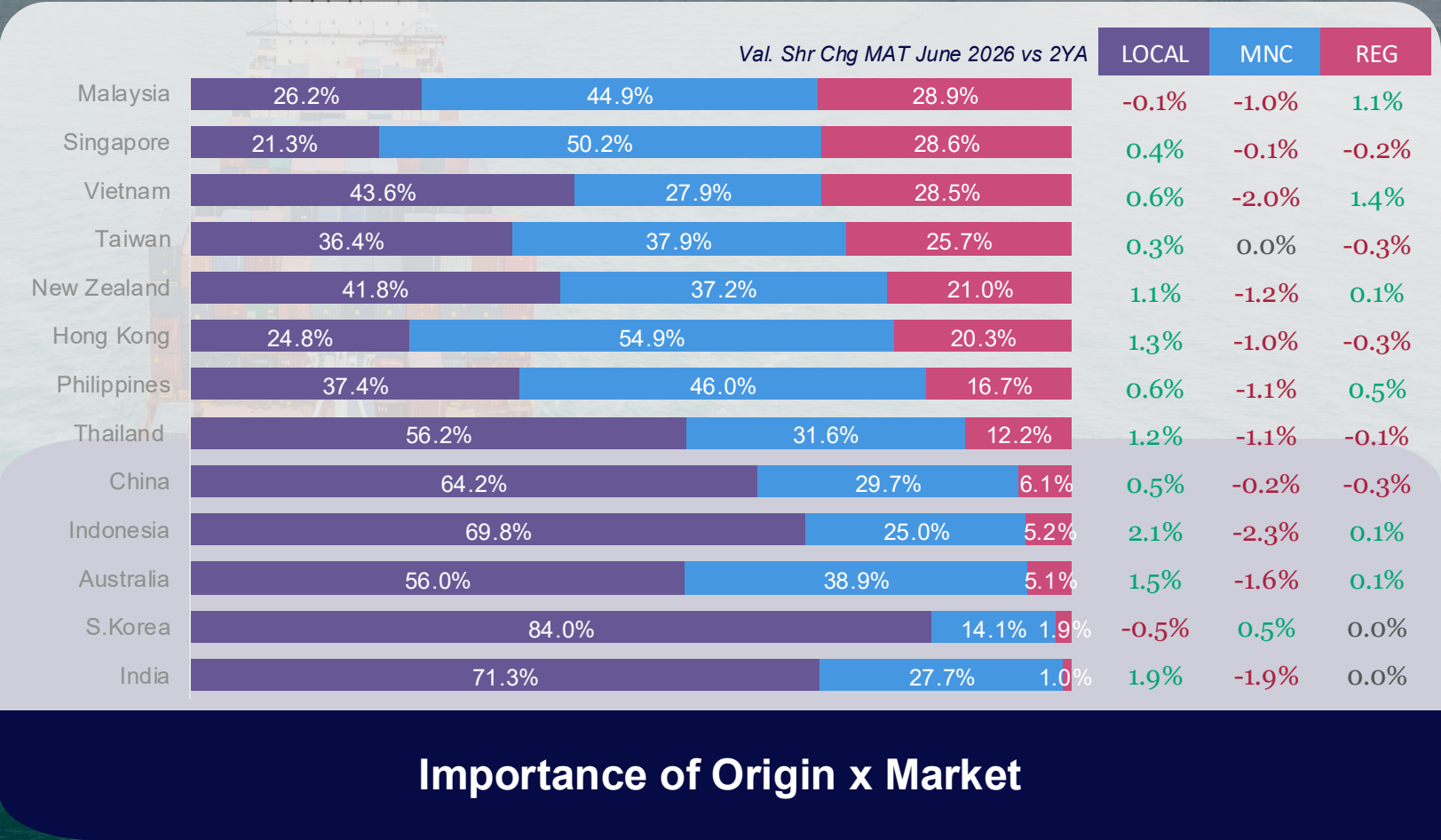
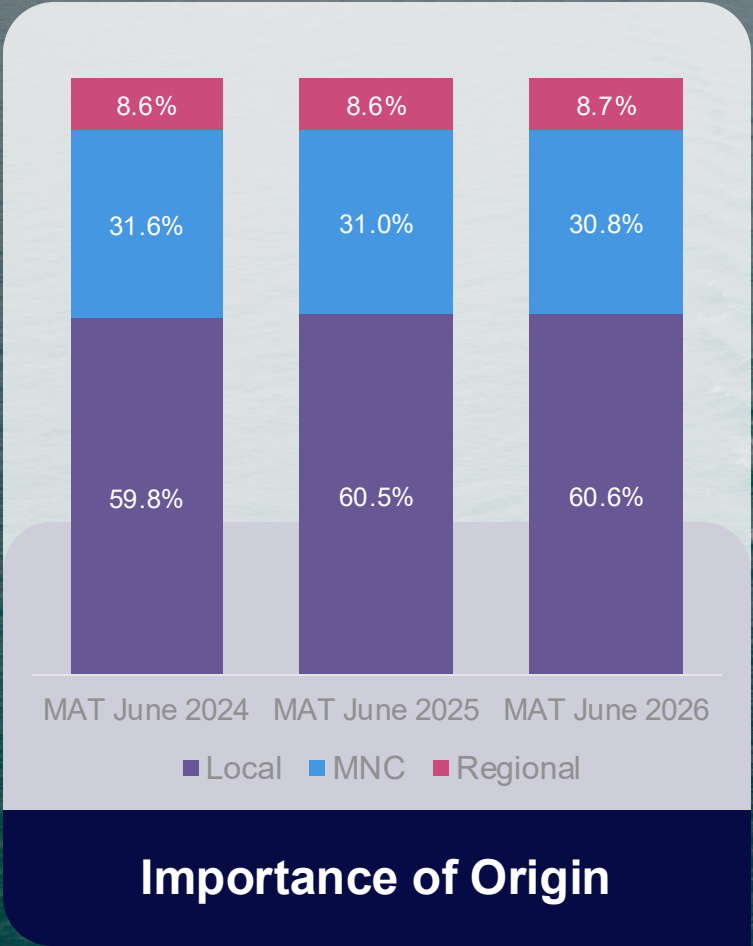


Learn from adjacent categories to identify ways to trade up/down consumers

Share change in value sales by Industry & Price Tier (MAT June 2026 vs 2YA)

		Value for Money (PI <80)		Mainstream (PI 81-120)		Premium (PI 121-160)		Super Premium (PI > 161)	
Trading up	Pet		-2.1%		-0.4%		0.4%		2.1%
	Alcohol		-0.9%		-1.6%		2.0%		0.4%
	Baby		-1.5%		-0.3%		1.1%		0.7%
	Laundry		-0.1%		-1.3%		1.1%		0.2%
	Oral & Personal		-0.4%		-0.9%		-0.2%		1.5%
	OTC & Health		-1.3%		0.1%		0.0%		1.2%
	Beauty		-0.3%		-0.8%		0.0%		1.0%
	Frozen		-2.2%		0.6%		0.8%		0.9%
	Beverage		-1.2%		0.3%		1.1%		-0.3%
Polarizing	Dairy		0.8%		-2.0%		0.1%		1.2%
Mainstream growth	Snacks & Conf		-0.7%		1.3%		-1.1%		0.5%
	Household		0.2%		0.4%		-0.9%		0.2%
	Pack Food		-1.0%		1.2%		-0.1%		-0.1%
Trading down	Tobacco		2.1%		3.1%		-4.7%		-0.5%

Expect to see competition intensify as local brands drive to become regional





To win in H2 2026 & beyond, brands must reignite volume growth, establish a clear brand architecture to maximize portfolio growth & profitability, and prepare for intensifying competition from agile regional players

Driving ROI through Pack Design **Jayati Basu**

Packaging is the most frequently seen marketing asset a brand owns

Packaging is the shortcut to choice and can have a meaningful impact on sales

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+4%

average **lift in actual sales** of our Annual Design Impact Award winners



...but if not executed well,

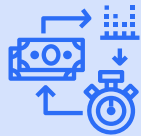
revenue declines of -6%
(average) are at risk

9 years of...

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Recognize
packaging
redesigns that drove
measurable growth



Understand the
design decisions
that contributed to
success



Learn principles
that can be applied
across brands and
categories



Inspire future
investment in
design as a growth
driver



Methods for understanding why design works



EEG (Neuro)

What the brain processes

- Emotional Engagement
- Cognitive Processing
- Message & Brand Activation



Eye Tracking

What captures attention

- Visual attention
- Viewing sequence
- Areas of focus

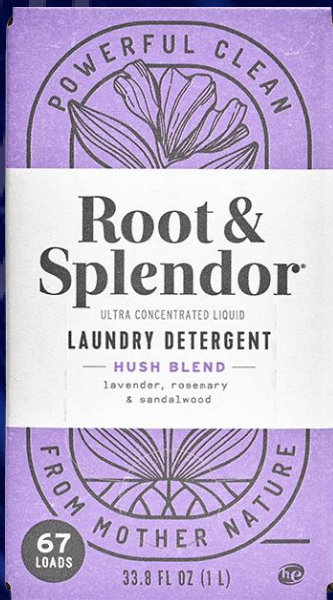


Survey

What shoppers report

- Perceptions
- Preferences
- Purchase Intent

9th Annual NIQ Design Impact Award Winners



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What can we learn from the winners?

Power of
SIMPLICITY

Persil

Less Noise. More Impact.

Design that makes the product
easier to choose



You don't get minutes.
*You get seconds to maximize
your packaging impact.*

~13 seconds
to make a decision

Shoppers make decisions quickly.

In a crowded aisle, complex
packaging gets passed by.



From complexity to clarity

Speak like your
consumer, not like
your category.

**Clear, everyday
language** makes
products easier to
understand and
easier to choose.

Before
Cluttered
Professional



After
Simplified
Approachable





How Persil simplified for impact



Simplified hierarchy

- Reduced competing elements
- Clear focal point



Simplified language

- “Everyday” removes friction
- New tagline is approachable / desirable



Removed distraction

- Cleaner background
- Stronger contrast

Clarity of information yields stronger takeaways

	Before	After
Excellent		Reliable
High Strong	Reliable	
Low Strong		Premium
High Good	Premium	Effective
Low Good		
High Fair	Effective	
Low Fair		
None		

Message resonance is a non-conscious, databased measure of how top of mind certain attributes are after viewing the pack in isolation.



Before: hard to read, light beam imagery obscures text and competing elements hinder legibility



After: arrow seal visually reinforces benefits proposition, background is clearer and better contrasts with the white, action-oriented text

Simplicity drives understanding

*Reduce effort.
Increase impact.*



The
Sweet Spot
award

DairyMaid Ice Cream

Familiar but Fresh

Familiarity builds trust.
Relevance keeps it growing.



Distinctive assets gain value over time



Brands accumulate meaning over time.

Packaging should embody and amplify brand associations.

The strongest redesigns highlight the assets and cues that already make a brand recognizable.

From dated to desirable

The best redesigns
amplify what
already works.

Before

Familiar

Feels disconnected



After

Familiar

Feels confident



*“Country Fresh has been a South African favorite for over 30 years, known for its generous tubs and familiar taste. But as the category evolved, its **nostalgic identity had lost relevance** with younger families. The **brand felt dated** and lacked shelf presence.”*

How Country Fresh amplified its strongest assets



Reclaimed the brand's blue

- Expanded the iconic blue across the full pack
- Creates stronger shelf presence and recognition



Simplified the visual structure

- Removed competing zones and decorative elements
- Aligned bold typography across the pack



Increased appetite appeal

- Larger, more appetizing product imagery
- Product becomes a key focal point on pack

Familiarity still matters when it feels relevant



99%

Agree the packaging conveys a product that is
“is a treat for the whole family”

The redesign modernized the brand without
sacrificing its broad family appeal.

Great redesigns
strengthen identity –
they don't replace it.

*Modernizing familiar
brand cues can
improve relevance
without sacrificing
recognition.*



The
CATEGORY
Creator

Liquid I.V.

From Product to Power Brand

Packaging that evolved with the
category it helped build

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A category was born. Then it scaled fast.
Liquid I.V. evolved with it.

When Liquid I.V. launched, hydration powders were niche – built for education.

Today, the category is mainstream, competitive, and growing fast.

Rapid growth reshaped the role of packaging.

~\$240M → ~\$586M
2022 2025

From instruction to identity

As consumers moved **from** “learning” to “choosing” the role of packaging changed

Before

Product-first

Cluttered hierarchy

Heavy emphasis on functional science, leaning medicinal



launched 2012

launched 2023

After

Brand-first

Clear, linear hierarchy

Balancing flavor and functional science



launched 2024



How Liquid I.V. evolved with the category



Simplified the message

- Reduced claim clutter
- Clearer hierarchy
- Flavor stands out



Elevated the aesthetic

- Richer color palette
- Cleaner typography
- Stronger consistency



Shifted to Brand First

- Bolder brand presence
- From explaining to signaling

Redesign made Liquid I.V. more *Premium* and *Delicious*

	Before	After
Excellent		
High Strong		Premium
Low Strong		
High Good		
Low Good	Premium	
High Fair		
Low Fair		
None		

Message resonance is a non-conscious, databased measure of how top of mind certain attributes are after viewing the pack in isolation.

More *Premium*
More *Delicious*

+11% tastes delicious

Bold brand presence, stronger imagery, and a clearer claims hierarchy drove more positive product / brand perceptions.

As categories mature, the role of packaging evolves

*Explain less.
Signal more.*



Design doesn't
create value by
looking better. It
creates value by
working better.

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The winners looked very different, but they succeeded for the same reason: they made it easier to shoppers to notice, understand and choose the brand.

The Neuroscience of Pack Design

Dr. Parul Savale PhD



Simplified language

Clutter free



Simplified visual structure



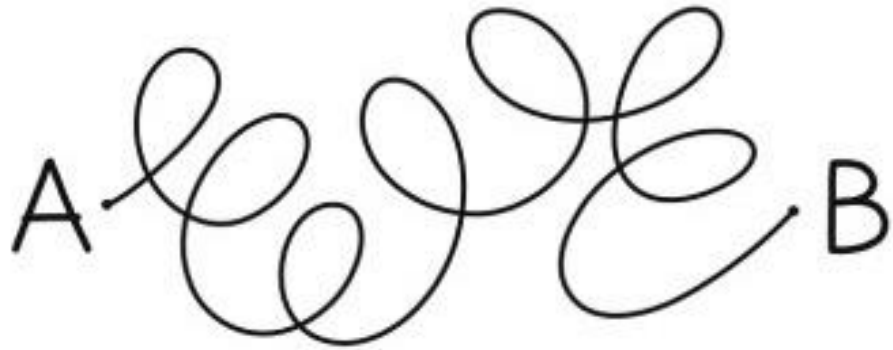
Simplified message

Clutter free

Why simple works for the brain?

We are cognitive misers

Simple presentation is rewarding and remembered better over time



Conceptual complexity

Difficult to follow ideas can tax cognitive resources and lower engagement.



Perceptual complexity

Multiple competing elements or busy unusual visual effects can tax the brain and lower engagement.

A good example of simplifying both perceptual and conceptual complexity

Before
Cluttered
Professional



After
Simplified
Approachable



Simpler design increased engagement with Persil pack

Easier to process, people lean in.



Emotional Motivation
A measure of lean-in



Zonal EEG Engagement
Quintile Distribution



A difference of 2.5 between Zonal EEG Scores is significant at the 75% confidence level.

Which information flow is easier to grasp?



Which joke is conceptually easy to understand?



100% halal

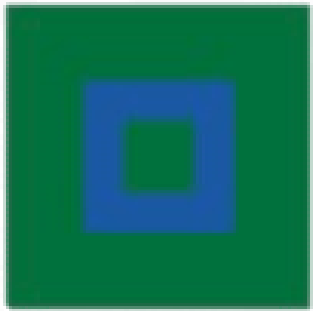
OFFICIAL
PRODUCT BY:
FLOATY



100% halal

OFFICIAL
PRODUCT BY:
FLOATY

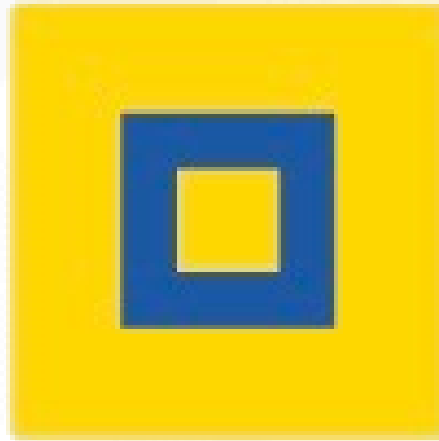
Contrast creates what stands out



Hard to notice



Noticeable



Stands out

The brain is wired to **detect differences quickly**. **Contrast** creates the strongest visual signal.

That signal creates a **clear focal point**, making products noticeable at shelf.

What **stands out gets seen** – and what gets seen gets considered.

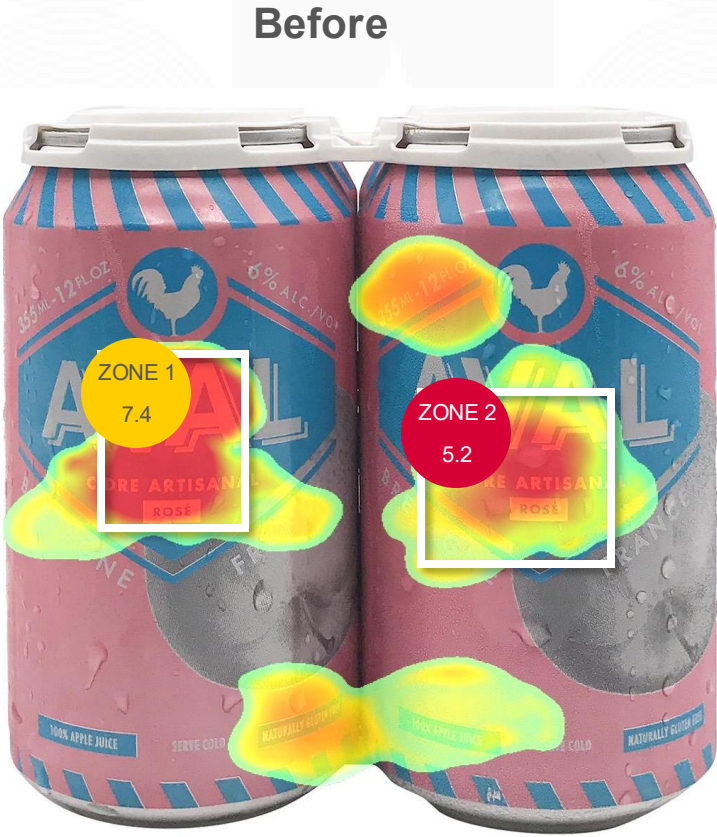
What do you think makes food more enticing in the redesigned pack?



Contrast

Easier entry points create stronger engagement

When it is easier to engage with, the pack is more memorable.



A difference of 2.5 between Zonal EEG Scores is significant at the 75% confidence level.

When color disappeared, shelf navigation and appetite appeal weakened



Calbee shifted 14 products to monochrome packaging to conserve printing materials. The move generated attention, but the initial uplift did not last.

Color acts as a fast visual shortcut for brand, flavor and food appeal

+45%

week-on-week sales value
during the peak publicity
week

4 consecutive weeks ↓

Sales then declined; the drop
from peak was the second-
largest in the past year

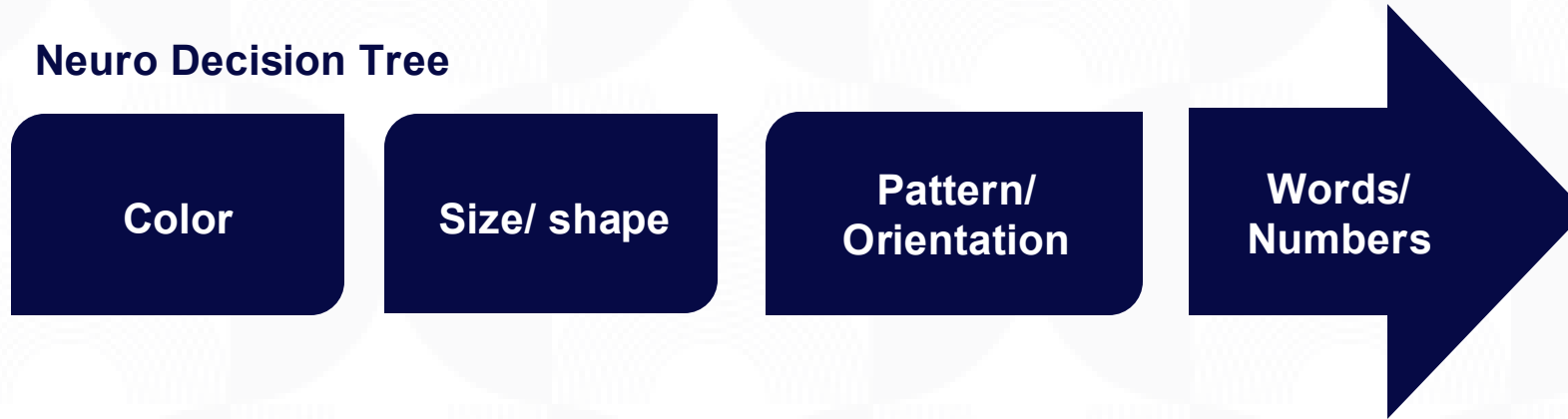
Shopper complaints:

“Hard to find” and

“Difficult to identify the flavor at a glance.”

Great packs and brand blocks gets noticed by prioritizing “what stands out” to the brain

Neuro Decision Tree



These fundamental visual cues have an immediate influence on how the ‘brain shops’ because brains work to simplify complex inputs.

Creating strong brand blocks can help packs:

- **Get noticed** by shoppers
- Help products **differentiate**
- **Mitigate confusion** at shelf
- Reinforce your **brand**

Ease of Processing (Fluency) Drives Emotion



Memory – A key decision metric

Memory = Familiarity = Relevance = Frame of Reference = Context

Familiarity enables connection



What do you think make the redesigned pack look more like Country fresh?



Use of familiar elements

Another use case for Familiarity: Collaborations!



Innisfree x Toy Story



McDonald's Hello Kitty x Godzilla



Cadbury's Dairy Milk x M Co Beauty

But do all collaborations drive equally strong associations?

Less intuitive associations can confuse shoppers!

Context matters

While a familiar character's presence can cause a spike in Memory, the character will not be able carry the product sale by themselves.

Alignment to the category or brand matters

Characters chosen to promote the brand should be aligned with the brand's values/ethos to avoid confusion or withdrawal.

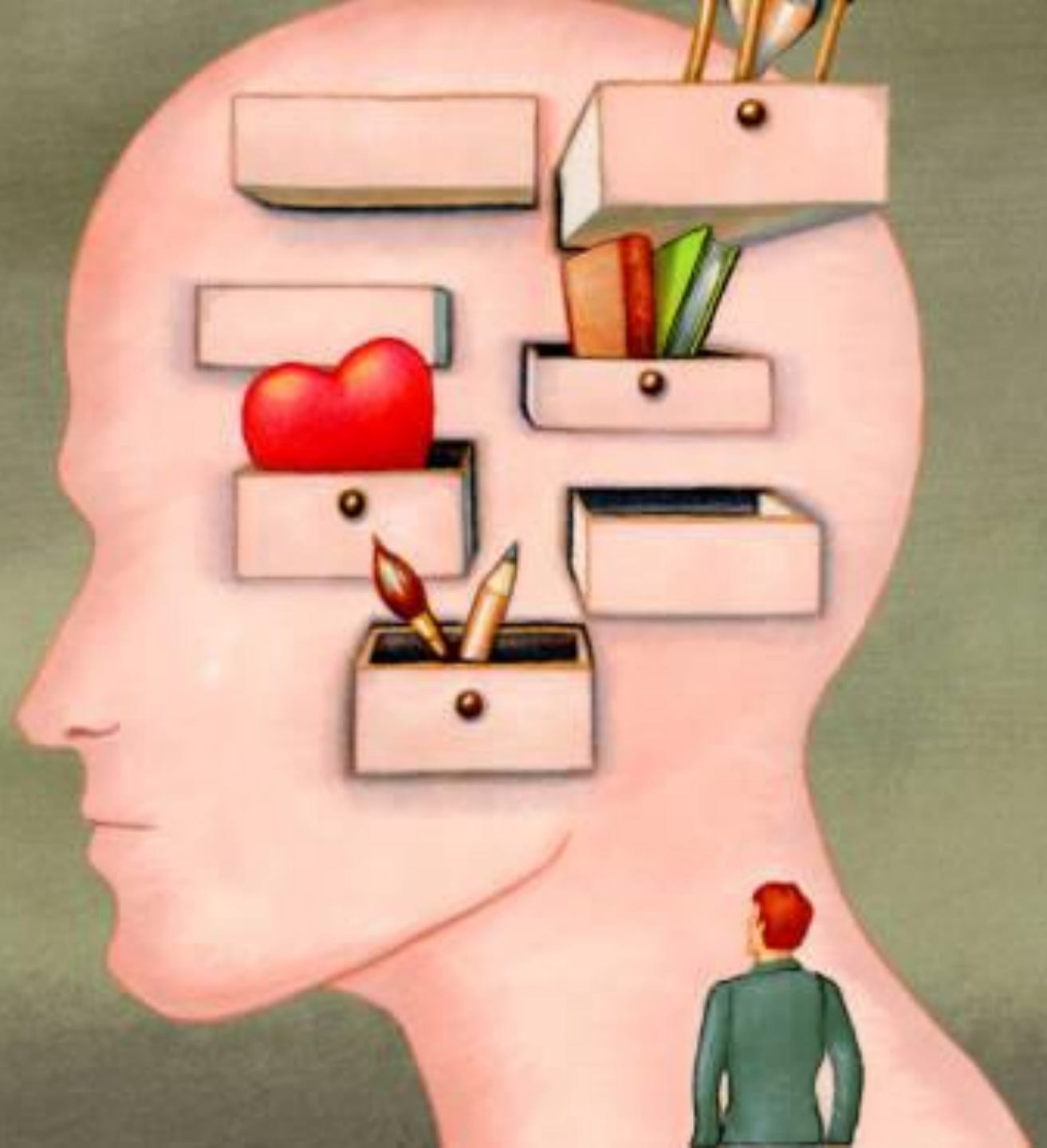
Another use case of Familiarity- Heritage

Hand-drawn elements, symbols and imagery communicate history, expertise, nostalgia and values

However, a heritage story should not appear old-fashioned; it must be modern, relevant & future-ready



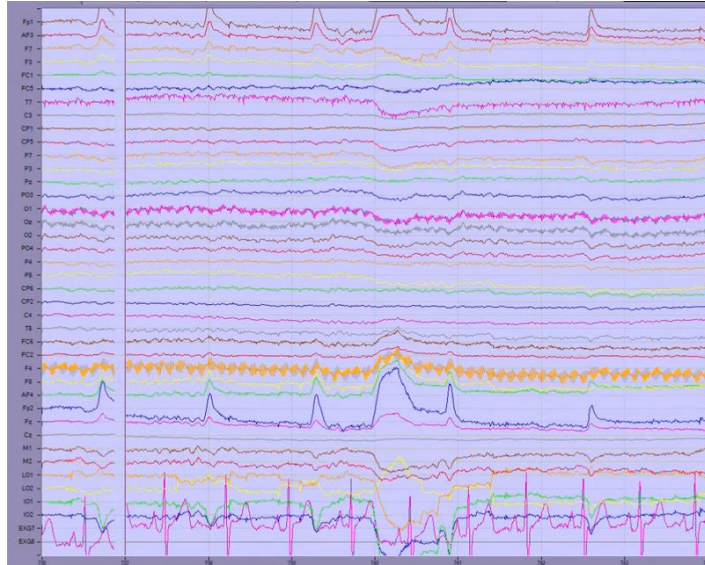
Familiarity and Relevance Drives Memory



Note: When we think of driving emotion and memory, it is not just restricted to design



No second guessing with NIQ's System 1 measurement



Neuroscience EEG

32 EEG sensors measure brain response
250 times per second

Decision Driving Metrics:
Emotion | Memory | Attention



Eye-Tracking

What attracts attention,
where viewers focus

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Q&A

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